

Referrals Expiring Report

Last Modified on 03/12/2024 3:00 pm AEDT

The Referrals Expiring Report allows the practice to see expiring referrals by Date, Practitioner and Appointment Type and send SMS notifications to patients requiring new referrals.

Running the report

The practice can plan the best way to implement this report, and then run it at regular intervals. E.g. weekly or monthly.

Considerations

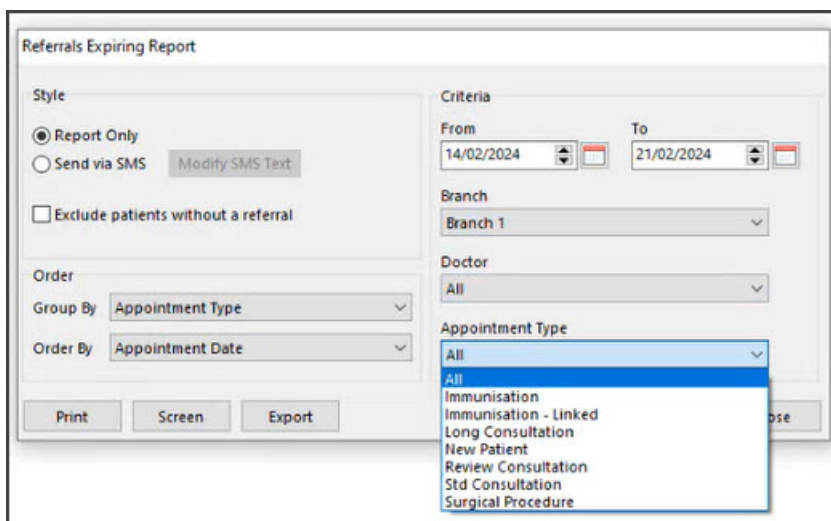
- The report looks for expiring referrals in future appointments, so patients need appointments to be included.
- The same user will receive an SMS each time they are covered by the report's parameters.

To run the report:

1. Go to Zedmed's **Management** tab.
 2. Select **Reports > Referrals Expiring Report**
- The **Referrals Expiring Report** screen will open.
3. Select the filters you want to apply to the report.

By default, the date range is for the upcoming week from the current day.

See the **Send via SMS** section below to learn about this option.



4. Generate the report.
- Select **Print** to send the report directly to a printer.
 - Select **Screen** to open it.
 - Select **Export** to download the report's data in a CSV file.

5. Review the report

Considerations:

- The **Expiry** date tells you if the referral will have expired by the appointment date.
- The **SMS= N** status means the patient has not been sent an SMS notification for that specific referral.
- **No referral** includes any patient with a referral for a different doctor to the doctor they have the appointment with.

You can use the checkbox to exclude patients without referrals.

Branch 1		Page 1				
Referrals Expiring Report						
Criteria			Style			
Start Date	14/02/2024	Include patients without a referral for the treating doctor				
End Date	21/02/2024					
Branch	Branch 1					
Doctor	All					
Appointment Type	All					
Order						
Group by: Appointment Type						
Order by: Appointment Date						
Doctor	Patient Name	DOB	Phone No	Appt DateTime	Expiry	SMS
Long Consultation						
Phillip Davis	Holloway, Knut	19/05/1995		15/02/2024 09:30	21/01/2024	N
New Patient						
GRACE HERMAN	Devo, Onlyname	01/01/1980		15/02/2024 10:00	02/02/2024	N
Phillip Davis	Black, Emma	13/12/1982		15/02/2024 10:00	No referral	N
Review Consultation						
Phillip Davis	Jones, Happy	04/12/1964	0412345678	15/02/2024 09:00	14/02/2024	N
Phillip Davis	Lamb, Daniela	20/10/1964		15/02/2024 09:15	14/02/2024	N
Phillip Davis	Biscuit, Sally	04/04/1984		15/02/2024 10:30	No referral	N

Sending via SMS

If you select **Send via SMS**, the report will be sent to the patients included in the report.

The report should be reviewed on **Screen** to check the recipients are intended.

Considerations.

- The text used can be modified before sending the SMS.
- **Close** must be selected to save and remember any changes.
- Right-click in the SMS Message field to display and add merge fields.

